

Student Affairs Assessment

Student Affairs Qualtrics Instruction Manual

A basic guide on creating, designing, and launching your own surveys in Qualtrics survey software.

For more information or questions, please contact [Stephanie Winters](#).

Student Affairs Qualtrics Protocol & University Survey Policy:

Prior to launch, the Assessment team must be notified of all surveys.

University Survey Policy:

Large projects (1,000+ respondents) and projects targeting Native Americans must receive approval from the University Survey Team at least 6 weeks prior to the start of the project.

- This policy helps to:
 - Maximize survey productivity
 - Minimize survey repetition and fatigue
 - Protect the privacy rights of survey participants.
- To view this policy, visit [University Survey Policy](#)
- Submit your survey proposal [here](#).
- **Requests should be routed through the SA Assessment team**
- Contact [Stephanie Winters](#) or call (928) 523-5892

Survey Consultation:

When you are aware of an upcoming project, please contact the SA Assessment team for a survey consultation.

- All projects must be added to the University and Student Affairs survey calendars to ensure there is no overlap with other scheduled projects.
- For the survey consultation, please bring the following:
 - The purpose of the survey/project
 - The target population
 - Launch, close, and reminder dates
 - Your plan for the data
 - Content of email invites, reminders, and end-of-survey messages
 - Incentives

Using Qualtrics:

Please schedule a one-on-one or group Qualtrics demonstration with the Assessment team prior to using Qualtrics.

- **All surveys must be shared with the Qualtrics group SA/EM**
- For more information on joining the group and sharing surveys, please refer to the Student Affairs Qualtrics Instruction Manual.

Contact your Survey Team representative for more information

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1. To join the SA/EM Qualtrics groups:

Request to be added to the SA/EM Group in Qualtrics through Stephanie

- Indicate the level of access you will need (Read/View, Write/Edit, Report)
- Provide UID, Emplid, and department

Login to Qualtrics at <https://nau.edu/its/services/qualtrics/>



Qualtrics at NAU

NAU ITS has partnered with experience management company Qualtrics to provide surveys for classes and research purposes. Qualtrics is the preferred survey tool for the university. The license is not available for use outside of university purposes.

To log into the NAU Instance of Qualtrics:

1. Go to nau.edu/qualtrics to be directed to NAU's single sign-on page.
2. Sign in with your NAU credentials.

Option 1



First-time users

When you access nau.edu/qualtrics for the first time, the system will recognize that you are accessing Qualtrics for the first time. Choose the I don't have a Qualtrics account option to create a new account and use your NAU credentials to log in.

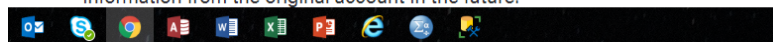
Option 2

Existing users



When you access nau.edu/qualtrics for the first time, the system will recognize that you are accessing Qualtrics as a part of NAU. You can migrate a previous Qualtrics account by choosing I already have a Qualtrics account. Use your existing Qualtrics credentials to become part of the NAU instance of Qualtrics. Information from your original account will be available in your new NAU-specific Qualtrics account.

Choosing not to migrate a previous account may cause difficulty retrieving information from the original account in the future.



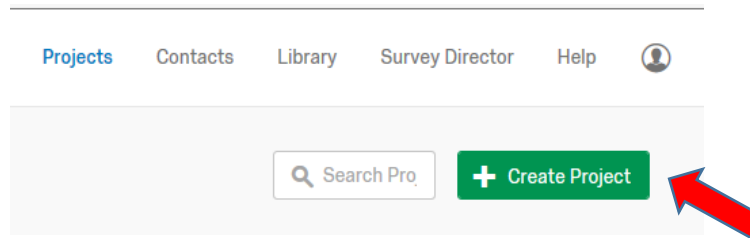
1. If you are first time user, click on the link for FIRST-TIME USERS in Option 1
2. If you have already logged with your NAU credentials, click on the link in Option 2

(NOTE: Please notify Stephanie when you have logged into Qualtrics so you may be added to the group)

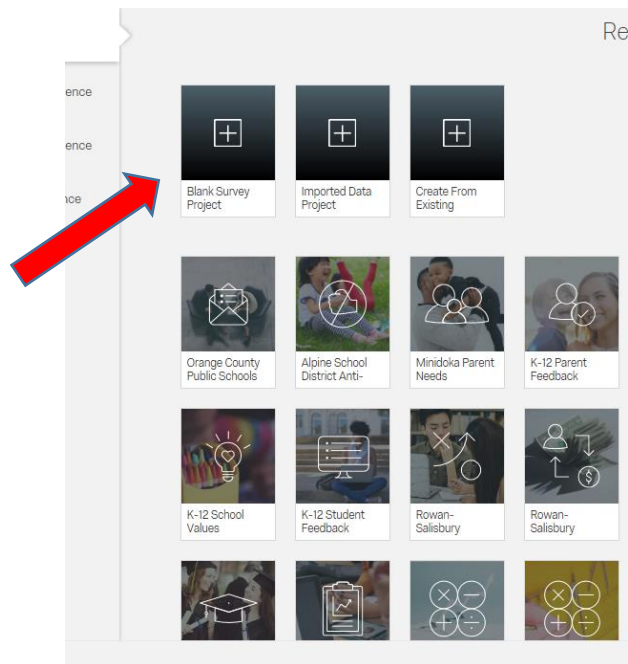
2. Creating Your Survey:

Create a new project:

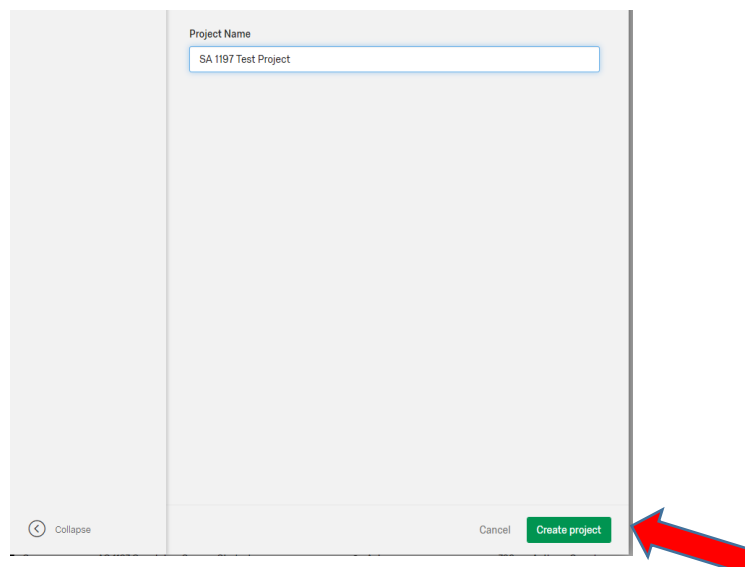
Once you are logged into Qualtrics, click on *Create Project* to get started



Select *Blank Survey Project* to start from scratch

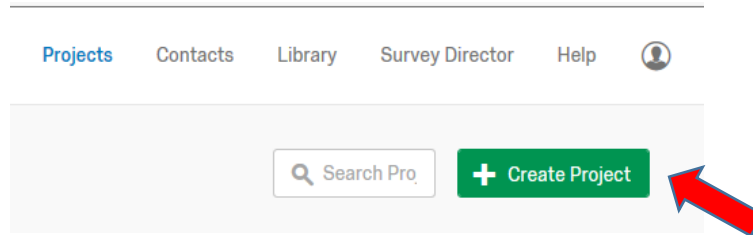


Give your project a title and then click *Create Project*

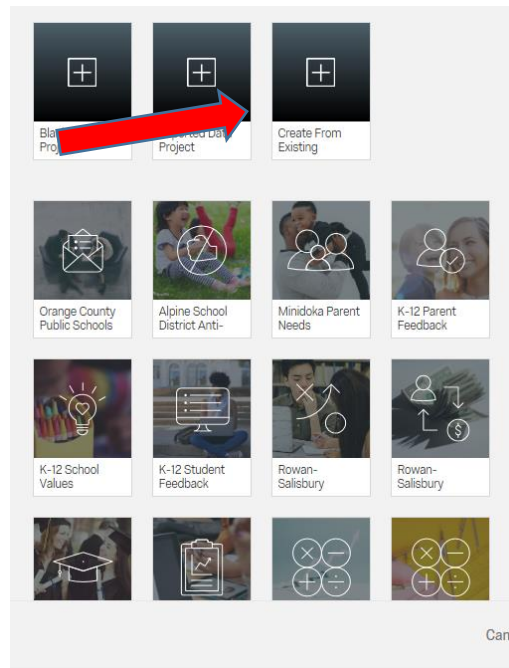


a. Copying an Existing Survey

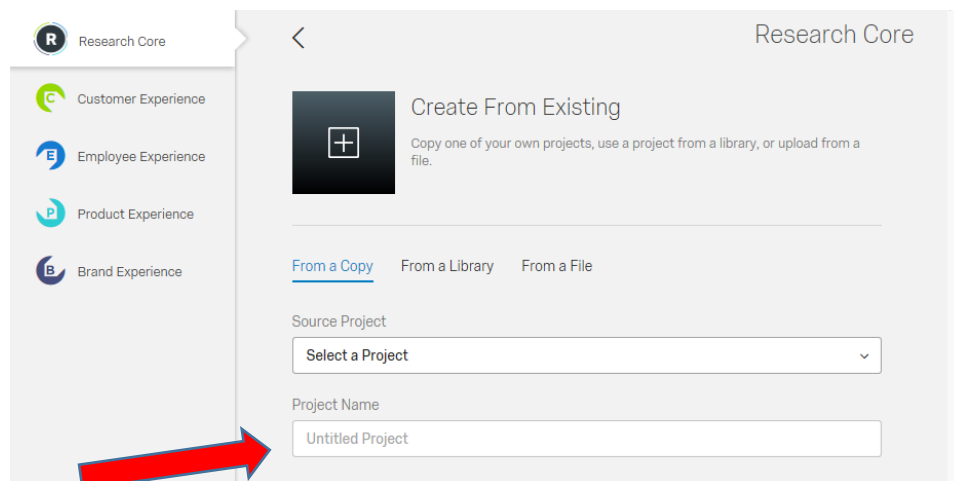
Once you are logged into Qualtrics, click on *Create Project* to get started



Select *Create From Existing* to copy and modify an existing survey.



Select the project you want to copy from the dropdown menu and rename the new version



b. Naming your survey:

Each department is identified by a two letter code listed below:

Department	Code
Academic Affairs	AA
Academic Success Centers	AS
Admissions and Orientation	AO
Advising	AD
Campus Health	CH
Campus Recreation	CR
Campus Services and Activities	CS
Career Development	CD
Enrollment Management	EM
First Generation Programs	FG
Health Promotion	HP
Housing	HO
Nizhoni Academy	NZ
Office of Inclusion	IM
Office of Indigenous Student Success	NA
Peer Jacks	PJ
Residence Life	RL
Student Life	SL
Student Service Center	SC
Student Support Services	SS
Transfer and Online Connections	TC
Upward Bound Academy	UB
Veteran Success Center	VT

Survey names should begin with the department code as well as the four-digit semester code during which the survey will be launched:

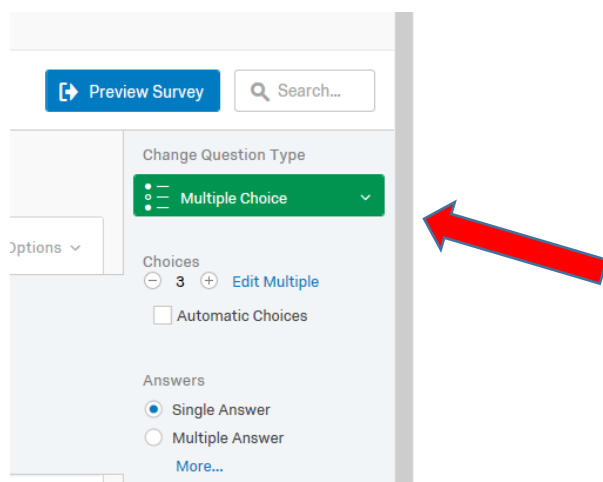
Semester	Code
Fall 2019	1197
Spring 2020	1201
Summer 2020	1204
Fall 2020	1207

The name of your survey should go directly after your department and semester codes.

- For example, the spring 2020 Campus Recreation Customer Satisfaction Survey should look like this: **CR 1201 Customer Satisfaction Survey.**

c. Designing Survey Questions:

There are several types of questions to put in your survey, which can be accessed using the dropdown menu on the right of your screen



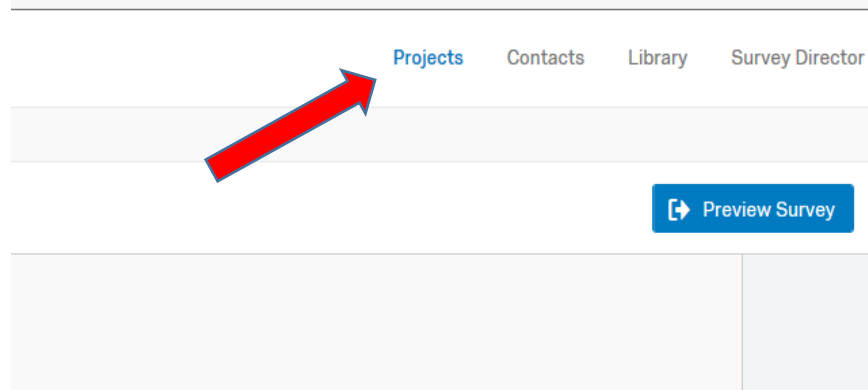
For more instruction on how to create and edit survey questions, visit the following Qualtrics pages:

- Question Types: <https://www.qualtrics.com/support/survey-platform/survey-module/editing-questions/question-types-guide/question-types-overview/>
- Creating Questions: <https://www.qualtrics.com/support/survey-platform/survey-module/editing-questions/creating-questions/>
- Formatting Questions: <https://www.qualtrics.com/support/survey-platform/survey-module/editing-questions/formatting-questions/>
- Block Options: <https://www.qualtrics.com/support/survey-platform/survey-module/block-options/block-options-overview/>

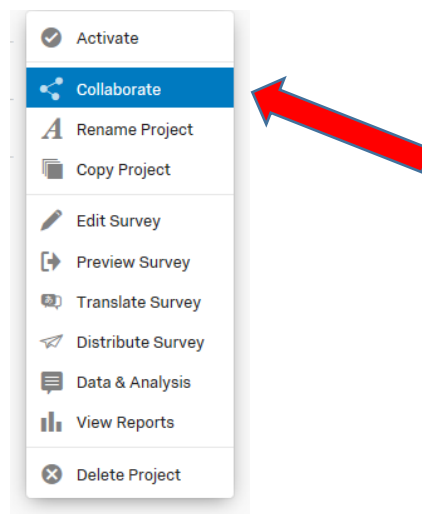
3. **Sharing Your Survey:**

Once your survey is complete, make sure to share it with SA or EM

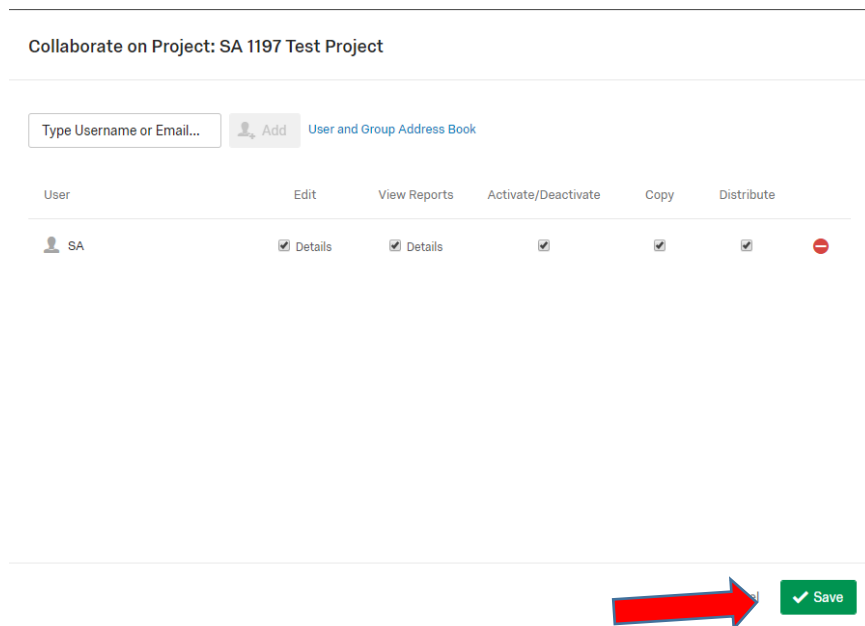
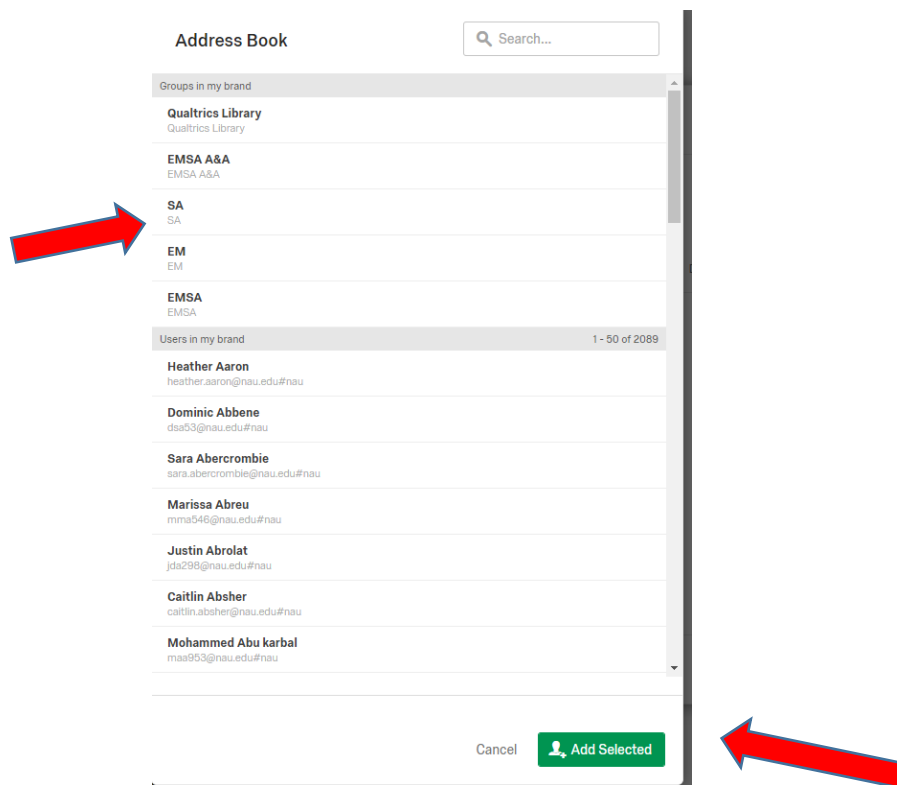
- Go back to the main screen by clicking *Projects*



- Click the arrow to the right of your project and select *Collaborate*



- Find SA/EM in your address book then click *Add Selected* then *Save*



Your survey can now be viewed by those included in the group SA/EM.

4. **Launching Your Survey:**

Launching through Email:

Once you have created your survey, you are ready to launch

- To launch through email to an existing list of potential respondents
 - Click *Contacts* then *Create Contact List* to upload your list of potential respondents
 - Make sure your list is in Excel, has headers for each column, and the first three columns contain First Name, Last Name, and Email respectively.
 - Save your list as a CSV file and upload the list to box below

Add Contacts

Import From a FileAdd ManuallyImport From a Survey

Browse...ReloadShow Options

File Requirements

- The first row must have the field names for each column.
- Each row must have a primary email address (Email). All other fields are optional (FirstName, LastName, etc.)
- The maximum file size is 100mb.

Updating Existing Contacts

- Use a 'RecipientID' column containing recipient IDs and add any optional fields
- Contact data will be updated. New fields will be added as necessary.

[Example Document](#)

- Go back to your *Projects* and click *Distributions*

How do you want to distribute your survey?

Email

Send with Qualtrics

Compose Email

Web

Social

Mobile

Use your own email system

Get a single reusable link

Generate a trackable link for each contact

- Click *Compose Email* and fill out the necessary information
 - In the **To:** box, find your newly created Contact List
 - Make sure to include any incentives and the survey close date in the body of your email.
 - **DO NOT** Change the *From Address*. This address is set by the university and has been white listed so that it may be received by all email accounts. However, you may enter your program's information in the *From Name* and *Reply-To Email* boxes.

Compose Email

To: Select Contacts ▾

From: From Address: noreply@qualtrics-survey.cc From Name: Stephanie Winters Reply-To Email: Stephanie.Winters@nau.edu

When: Send in 1 hour ▾

Subject: Subject ▾

Message: Load Message ▾ Save As

Follow this link to the Survey:
 \${!://SurveyLink?d=Take the Survey}

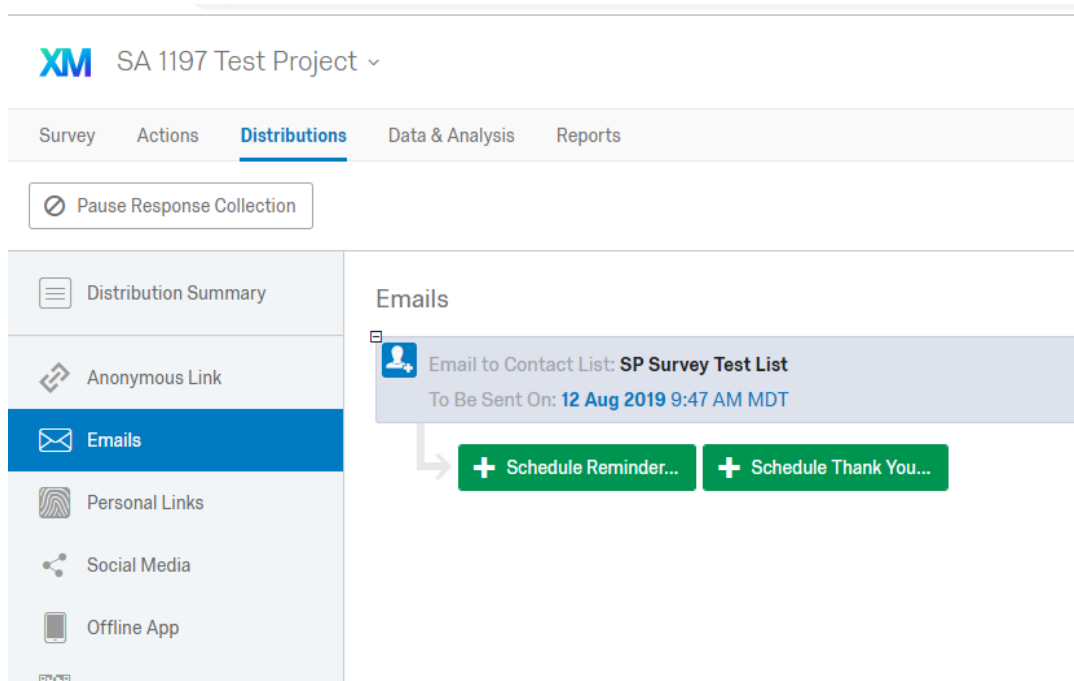
Or copy and paste the URL below into your internet browser:
 \${!://SurveyURL}

Follow the link to opt out of future emails:
 \${!://OptOutLink?d=Click here to unsubscribe}

[Show Advanced Options](#) Cancel Send Preview Email ✓ Send in 1 hour

- **NOTE:** All of the links shown here must be present in your outgoing email in order to be able to send (even the opt-out link)

- Once you launch the survey via email, you can set up reminders to go out to respondents who have not yet started the survey by a specific date as well as set up a “Thank You” message to be sent upon completion.

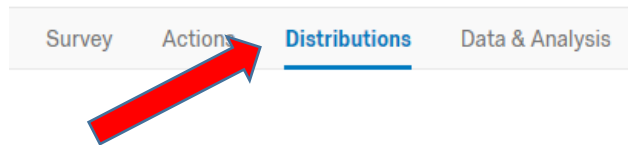


a. **Launch through an anonymous link:**

Once your survey is completed you can launch using an anonymous link

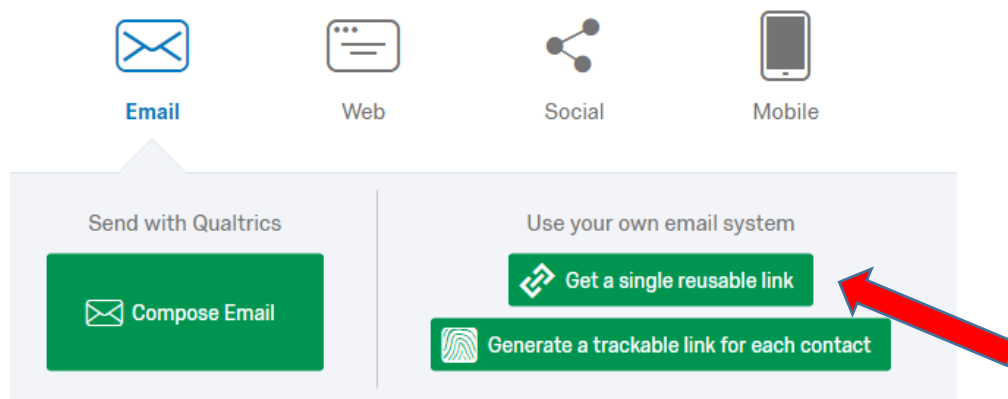
(NOTE: The anonymous link will not track respondents)

- Click on Distributions at the top of your Qualtrics menu



- Next click on Get a single reusable link in the middle of your screen

How do you want to distribute your survey?



- You can customize the survey link to match the name of your survey or use the one assigned to you by Qualtrics

Anonymous Survey Link

A reusable link that can be pasted into emails or onto a website,
and is unable to track identifying information of respondents.

http://nau.co1.qualtrics.com/jfe/form/SV_9Xh7U8w3h67WVq5

Link Text

2019 Customized Link Name

HTML

<a target=_blank href=http://nau.co1.qualtrics.com/jfe/form/SV_9Xh7U8w3h6

[2019 Customized Link Name](#)

- Simply copy and paste your survey link and begin distribution.

5. Downloading Data/Responses:

To download your data set in a CSV/Excel file, click *Data & Analysis*. You will see all of the responses collected by the survey in rows and each of the survey questions in columns.

- Click the *Export & Import* drop down menu then *Export Data*

ih Selected ▾

Page 1 of 1 ▾

Export & Import ▾ Edit Tools ▾


Recorded Date	Q1 - What is your sex?	Q10 - Do you use campus rec?	Q3 - Do you eat cheese?	1_Q10 - More informal recreation times (basketball, racquetball, etc.) - How likely are you to use these facilities?	Actions
Nov 6, 2017 2:46 PM	Female	Yes	Maybe	Somewhat Likely	▾
Nov 6, 2017 2:46 PM	Male	No	No	Not likely	▾
Nov 6, 2017 12:32 PM	Male	Yes	Yes	Somewhat Likely	▾
Nov 6, 2017 12:17 PM	Male	No	Yes	Very likely	▾
Nov 6, 2017 11:59 AM	Male	Yes	Yes	Very likely	▾

Export Data...
Import Data...
Manage Previous Downloads...

- Select CSV then the type of data you want displayed (numeric will be only numbers and choice text will be only labels). Click *Download* to get your data

Download Data Table [Use Legacy Exporter](#)

CSV TSV XML SPSS User Submitted Files

 Comma separated values

This is a .csv file that can be imported into other programs. Each value in the response is separated by a comma and each response is separated by a newline character. If your responses contain special characters and you will open this export in Microsoft Excel we recommend using the TSV export. Qualtrics CSV exports use UTF-8 encoding, which Excel will not open correctly by default. [Learn More](#)

☒ Download all fields

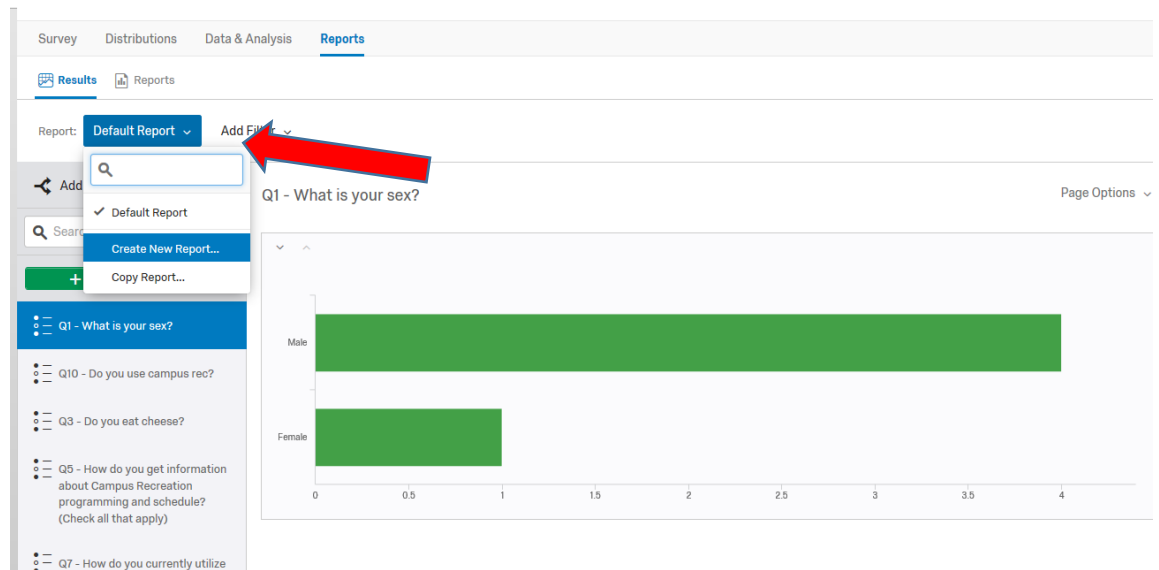
☒ Use numeric values
☐ Use choice text

[More Options](#) [Close](#) [Download](#)

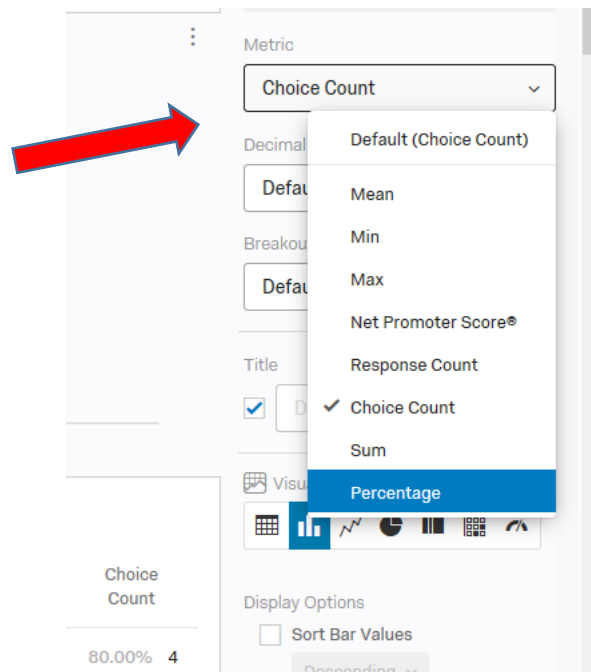
6. **Creating a Report:**

Click on *Reports*. You will see a series of graphs containing your survey data.

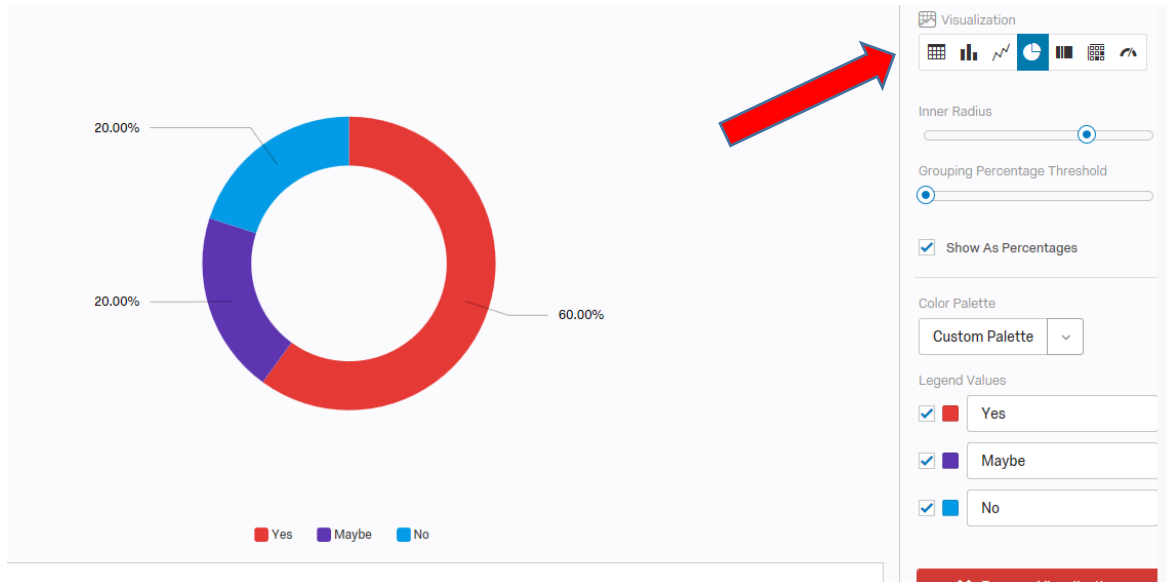
- Click on the dropdown menu next to *Default Report*.



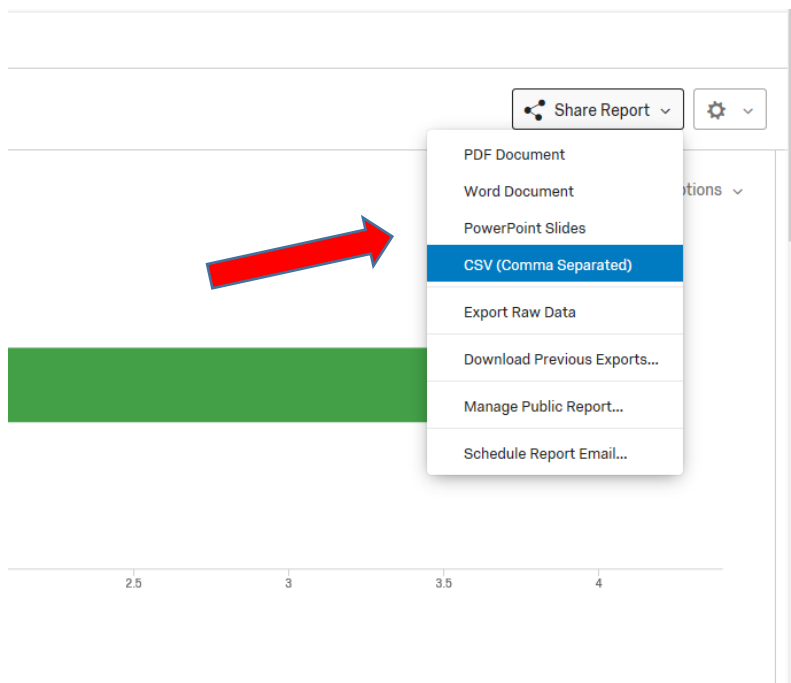
- To edit the color, content, or labels of the graphs, click on the graph and select your desired settings from the sidebar menu.
 - The default setting is set to display the number of responses. To display percentages of responses, click the dropdown menu under *Metric* then select *Percentage* (NOTE: you must make this change to each graph)



- You can also change the type of graph you wish to display by clicking on the graph and selecting the desired graph type from Visualization (NOTE: you can also choose to display your question data in a table with statistics rather than a graph using the same Visualization option).



- To create a Default Report, click on *Default Report* then click the dropdown menu next to Share Report. Finally, select the type of file you would like your report in (e.g. PDF, Word, CSV, etc.)



- Select the questions you would like to include in your report then, click *Export Pages* to download your report.

Export Report

PDFWordPowerPointCSV

Search Pages...

Select AllSELECTED: 19

☒ Q1 - What is your sex?

☒ Q10 - Do you use campus rec?

☒ Q3 - Do you eat cheese?

☒ Q5 - How do you get information about Campus Recreation programming and schedule?
(Check all that apply)

☒ Q7 - How do you currently utilize the Recreation Center and/or Wall Aquatic Center?
(Check all that apply)

☒ Q9 - Which of the following program and activities would increase your use of the
Recreation Center and Wall Aquatic Center (Check all that apply)?

☒ 1_Q10 - How likely are you to use [Field-1] if offered?

☒ 2_Q10 - How likely are you to use [Field-1] if offered?

☒ 3_Q10 - How likely are you to use [Field-1] if offered?

Cancel

Export Pages

